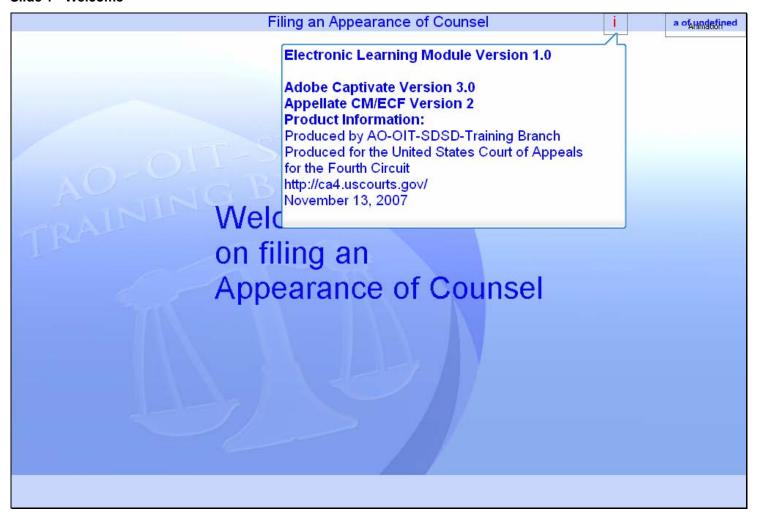
Slide 1 - Welcome



## Slide notes

Welcome to the lesson on filing an Appearance of Counsel.

# Slide 2 - Navigation Instructions

# **Navigation Instructions**

In order to closely simulate the CM/ECF application, each screen in this lesson will contain instructions for you to follow that mimic the actual software. Follow those instructions to progress through the lesson.

You may also use the playback controls at the bottom of each screen. You may move forward or back and you may rewind to the beginning of the lesson. You can also drag the progress indicator bar forward or back through the lesson. The playback controls include a pause/play button. If you pause the lesson, click the button again to resume.

There is also a menu on each page in the upper left corner. If you move your mouse over the word **MENU**, a menu will drop down. You can click on the desired topic to jump to that part of the lesson.

These CM/ECF lesson modules also have a Closed Captioning feature. Click the CC button in the playback controls to toggle closed captioning on or off. You may also click the speaker icon to toggle the audio on or off.

For version information about this lesson module, roll your mouse over the "i" in the heading.

To exit the lesson, click the X in the upper right corner of the lesson window, or select **Exit the Lesson** from the menu.

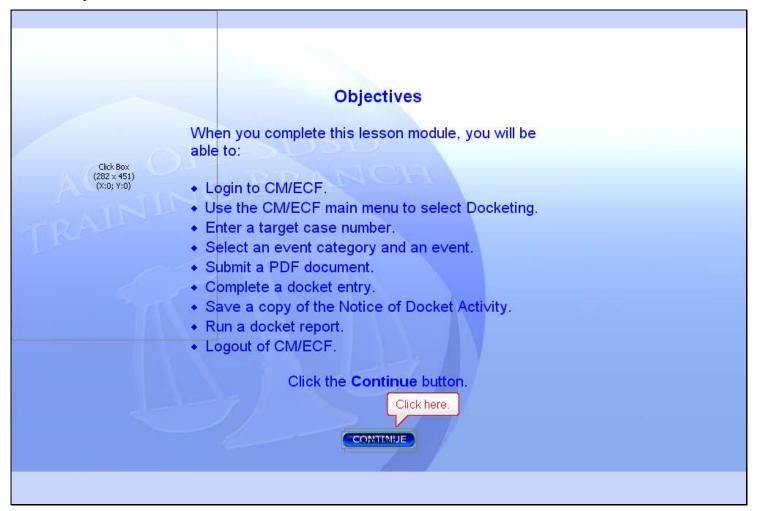
Click the Start button when you're ready.



#### Slide notes

These are the instructions on navigating through this lesson module. When you're ready to start the lesson, click the Start button.

Slide 3 - Objectives



#### Slide notes

Here are the objectives for this lesson. These are the things you will be able to do when you complete it. Click the Continue button.

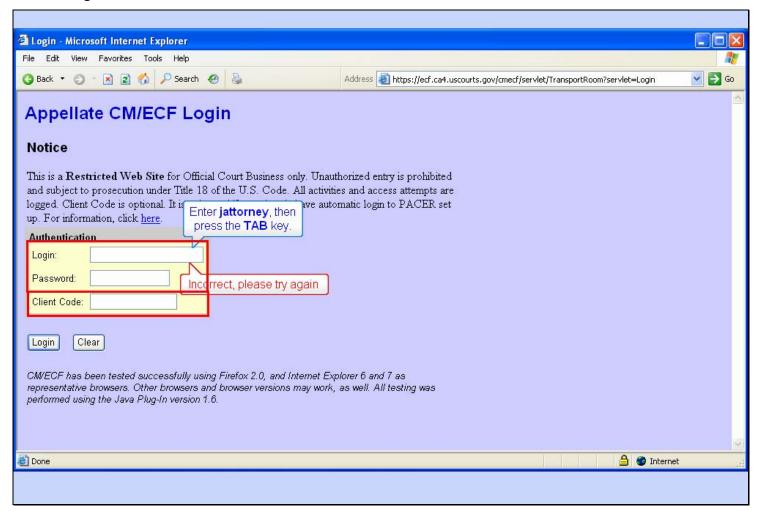
#### Slide 4 - Slide 4



# Slide notes

We'll begin by logging into the CM/ECF application. We have used Internet Explorer to navigate to the court's CM/ECF web site. On this page, click the hyperlink for the CM/ECF Document Filing System.

# Slide 5 - Login Screen



#### Slide notes

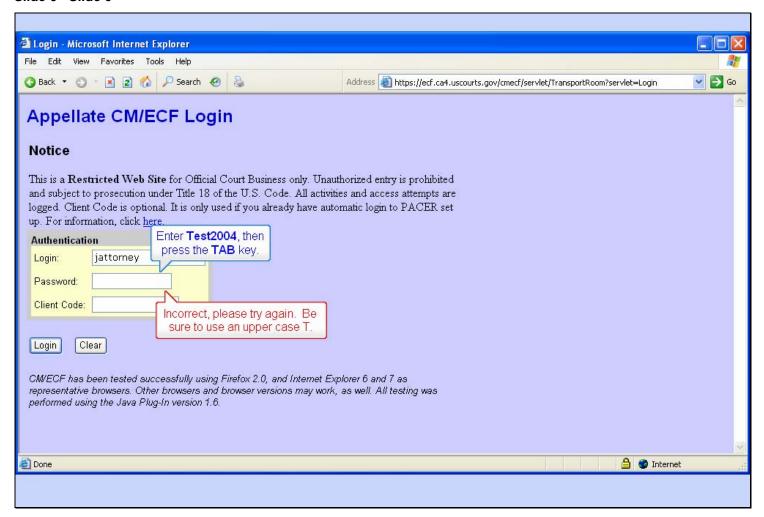
The Appellate CM/ECF Login page loads. On this screen you need to enter the login and password that were assigned to you for electronic filing purposes. This is different than the normal PACER login and password used for retrieving information from the PACER Service Center.

Both the login and the password are case sensitive. This means you must enter them in upper or lower case exactly as they were assigned to you.

The Client Code is optional. It's used to help you keep track of PACER fees by client.

We'll begin by entering your login. For this lesson module, we will assume your are John H. Attorney, and you are going to file an appearance of counsel form for Carolyn Henderson, the appellant in one of your cases. In the Login field, type "jattorney", then press the TAB key.

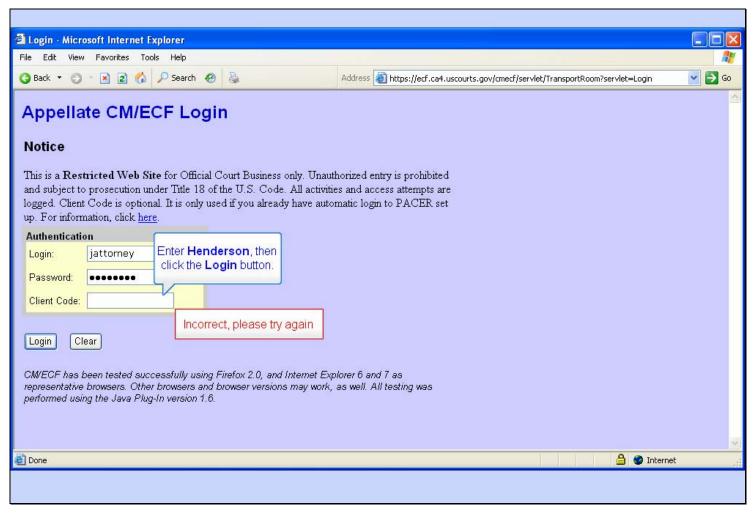
#### Slide 6 - Slide 6



## Slide notes

In the Password field, type "Test2004" (with a capital T), then press the TAB key.

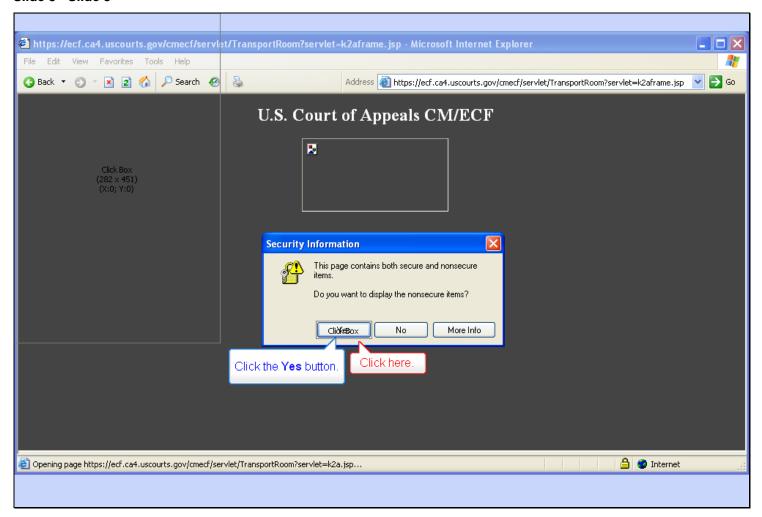
#### Slide 7 - Slide 7



## Slide notes

For the Client Code, type "Henderson", then click the Login button.

#### Slide 8 - Slide 8



# Slide notes

Since you're connecting to a secure web site, the browser shows you a security information dialog box. Click the Yes button to continue.

#### Slide 9 - Slide 9



# Slide notes

# Slide 10 - Slide 10



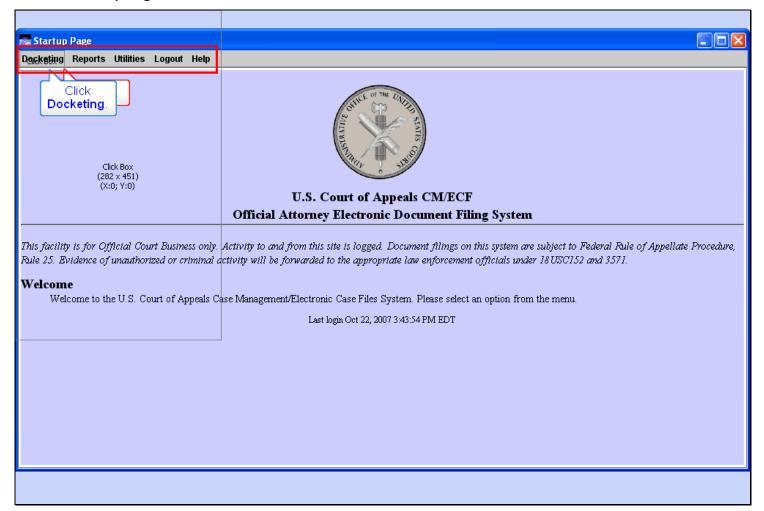
# Slide notes

# Slide 11 - Slide 11



# Slide notes

# Slide 12 - Startup Page



# Slide notes

When the login process is completed, CM/ECF shows you the Startup Page. There's a menu at the top of the page. This is the main CM/ECF menu.

To begin filing your appearance form, click the Docketing menu item.

#### Slide 13 - Slide 13



# Slide notes

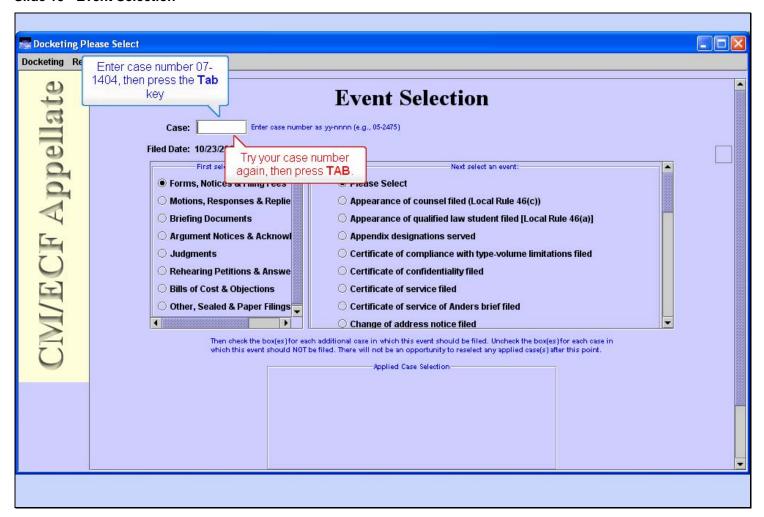
Now click Docketing again.

#### Slide 14 - Slide 14



# Slide notes

#### Slide 15 - Event Selection

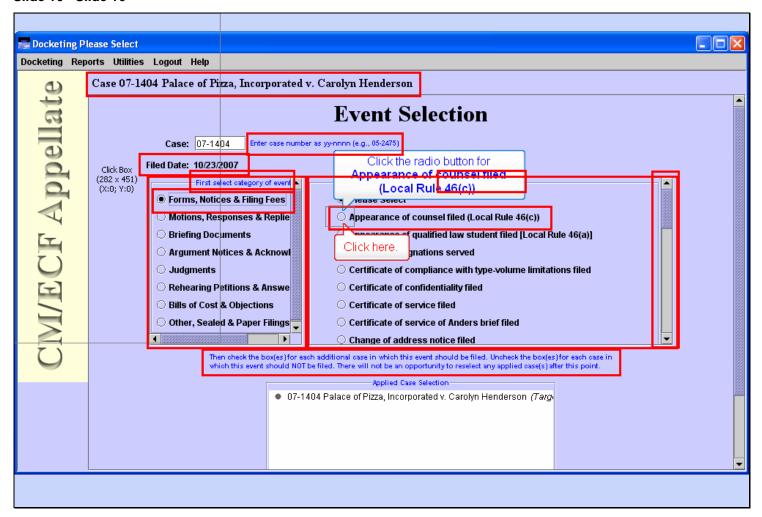


#### Slide notes

The Docketing window opens and displays the Event Selection screen segment.

Before you begin filing anything, you must first enter the target case number. The case number is made up of a two-digit year, followed by a dash, and then a number. For our practice case, enter case number 07-1404, then press the TAB key.

#### Slide 16 - Slide 16



#### Slide notes

CM/ECF retrieves the case title for the case number you entered and displays it at the top of the screen. You should first verify that this is the correct case before you continue.

You'll notice the system uses the current date as the Filed Date.

Also note that CM/ECF instructions to you on the screens are in blue text. If you're ever unsure about what to do, be sure to read the instructional text on the screen.

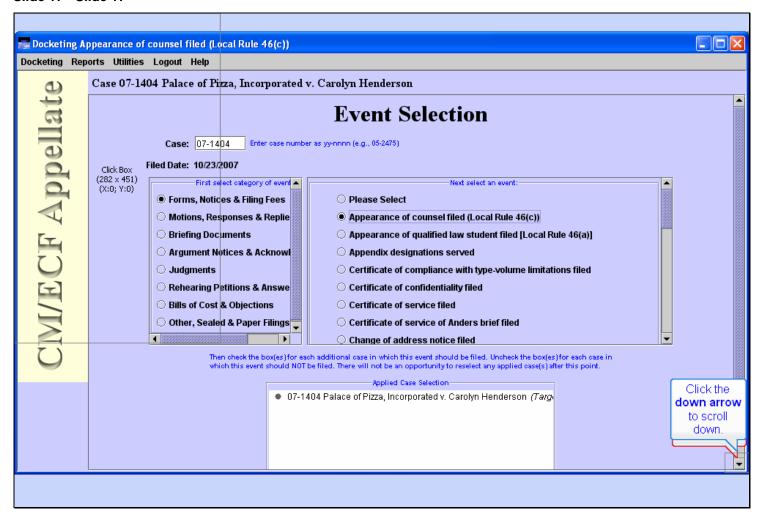
You must now tell CM/ECF what you are adding to the docket of this case by selecting an event category in the left pane, then an event in the right pane. You do this by clicking a radio button for the category, then a radio button for the event within that category. As you click the button for an event category in the left pane, the events list in the right pane will change to reflect the events in that selected category.

You can get a list of the categories and events within each category from the court's web site.

For our appearance of counsel form, the correct category is Forms, Notices & Filing Fees. That category is already selected by default, and the events in the right pane are all the events in that category. Notice the list of events has a scroll bar, and it may be necessary to scroll down to locate the specific event you need.

In this case, the first event in the list is Appearance of counsel filed (Local Rule 46(c)). Click the radio button for that event to select it.

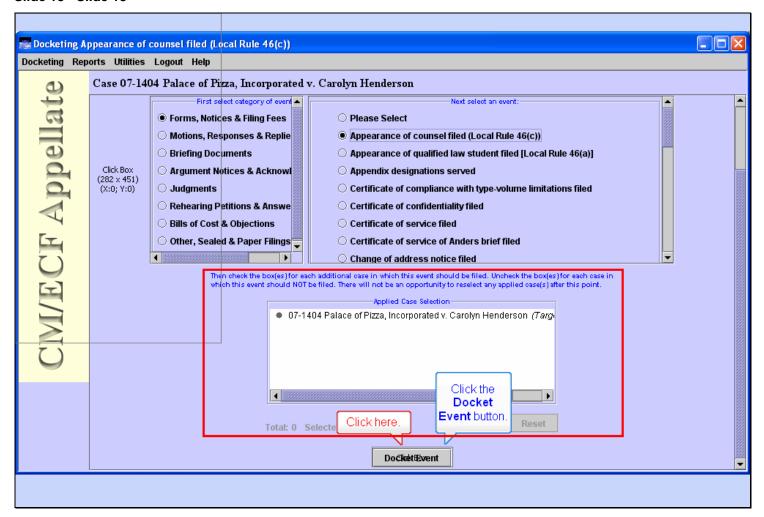
#### Slide 17 - Slide 17



## Slide notes

Now that you have the correct category in the left pane and the correct event in the right pane both selected, click the down arrow in the scroll bar to scroll down.

#### Slide 18 - Slide 18

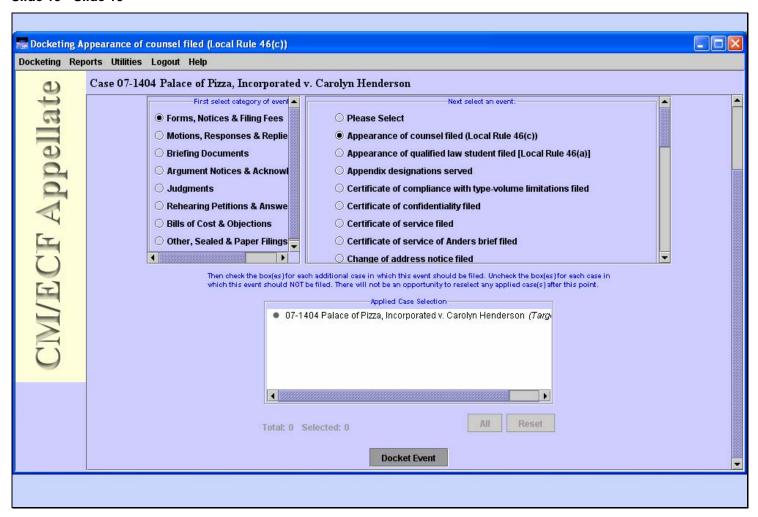


## Slide notes

If you were filing a document in consolidated cases, the Applied Case Selection box would have those related cases listed along with your target case. As the blue instructional text indicates, you would select the appropriate related cases here before you continue. Since our practice case has no related cases, our filing only affects our target case.

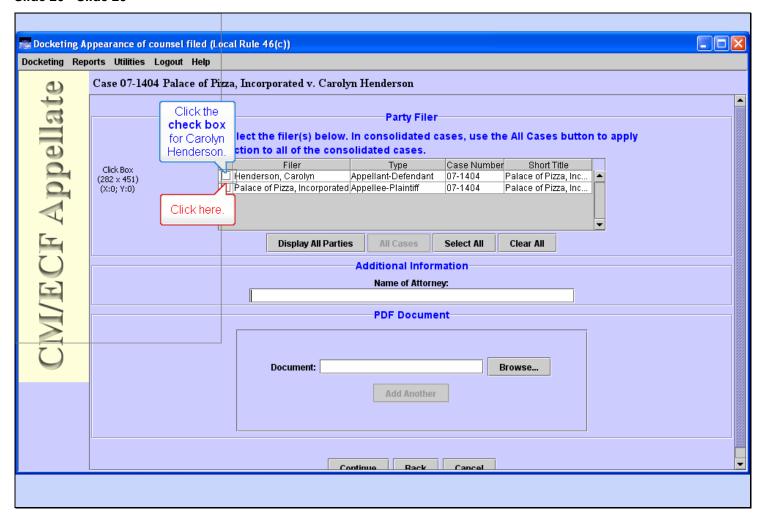
Click the Docket Event button.

#### Slide 19 - Slide 19



## Slide notes

#### Slide 20 - Slide 20

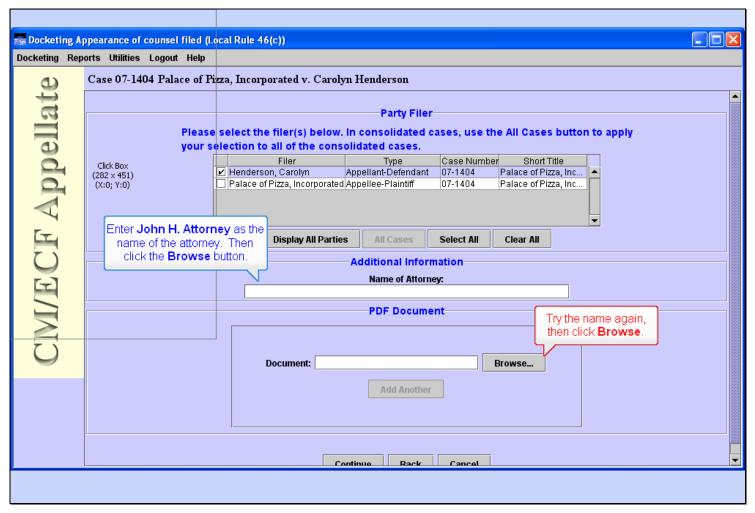


## Slide notes

A new window opens with the screens for docketing the Appearance of Counsel form.

First, you must select the filer of this document. Click the check box for Carolyn Henderson.

#### Slide 21 - Slide 21

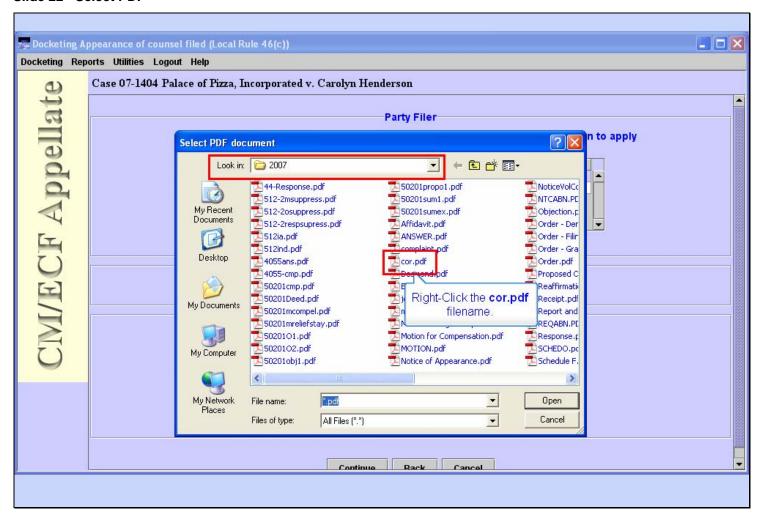


#### Slide notes

Now, enter John H. Attorney in the Name of Attorney Field.

After the name is entered, the next step is to locate the Appearance of Counsel form that you are going to file electronically. This form must be in Portable Document Format, or PDF. To locate the form, click the Browse ... button to browse through the folders on your computer to locate the form.

#### Slide 22 - Select PDF



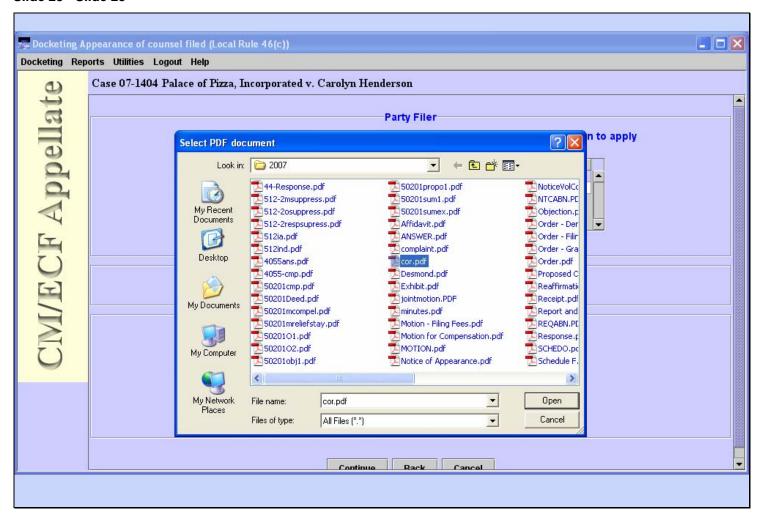
#### Slide notes

A Select PDF document dialog box opens. For more information about how to browse the folders on your computer, see the lesson module on Windows Navigation.

This dialog box indicates we are looking in a folder named 2007 at PDF files. The one we want to file is named cor.pdf. But we should make sure it's the correct file. A good practice is to take a quick look at the contents of the file before we submit it to the court. The way to do that is to right-click the filename, then from the drop down menu select Open with Acrobat.

Watch your screen as I do that for you.

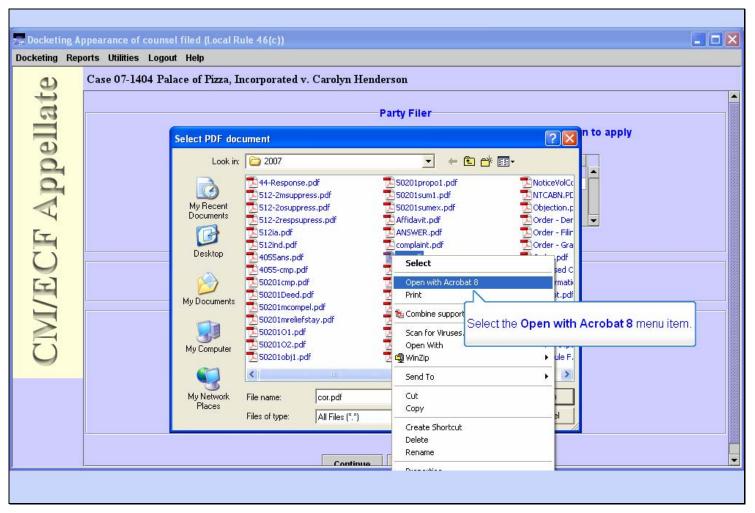
#### Slide 23 - Slide 23



## Slide notes

Right Click the file name.

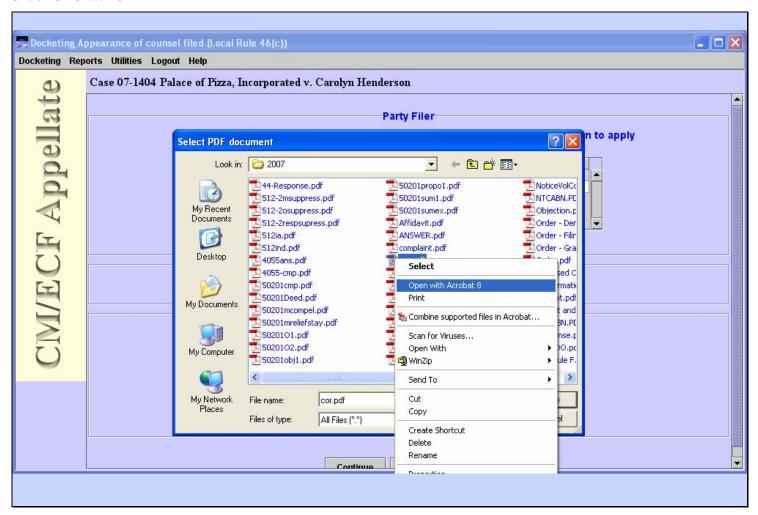
#### Slide 24 - Slide 24



## Slide notes

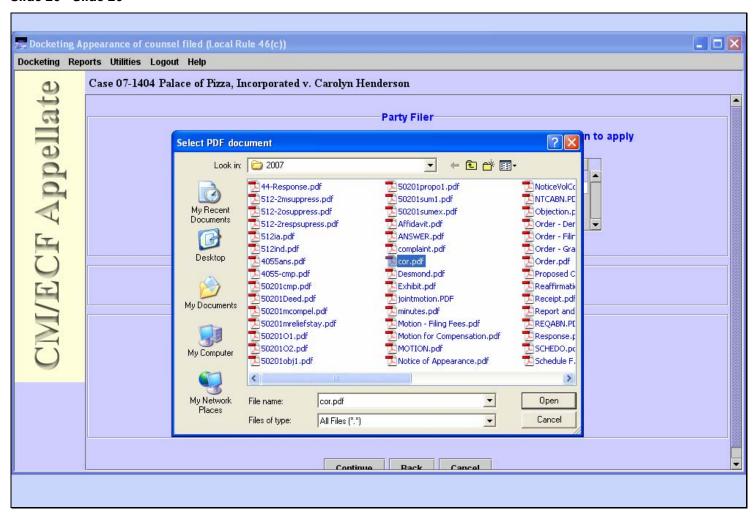
Then select Open with Acrobat 8.

#### Slide 25 - Slide 25



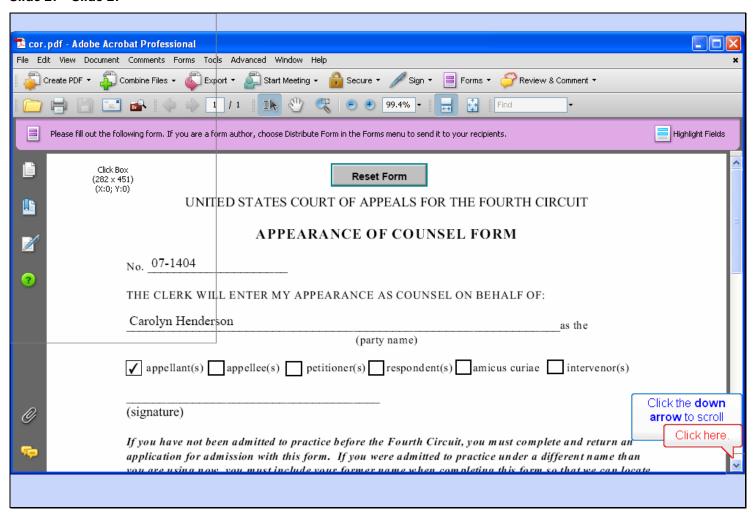
## Slide notes

#### Slide 26 - Slide 26



## Slide notes

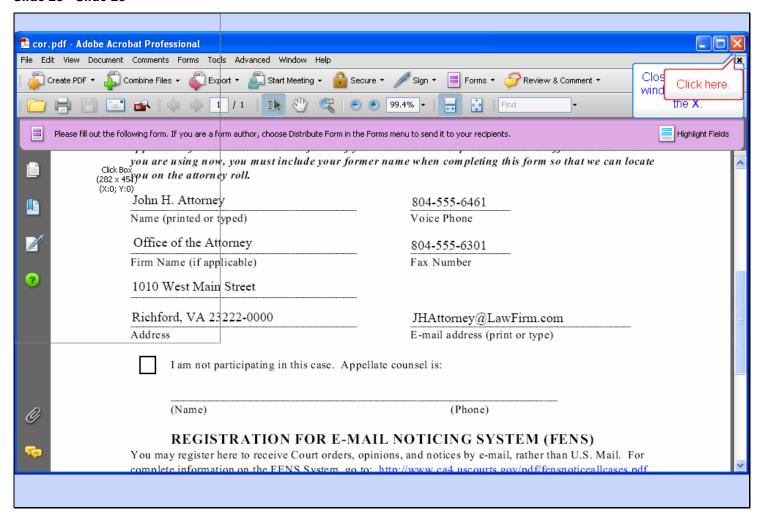
#### Slide 27 - Slide 27



## Slide notes

Adobe Acrobat opens the file and displays its contents to you. Click the down arrow in the scroll bar to scroll down some.

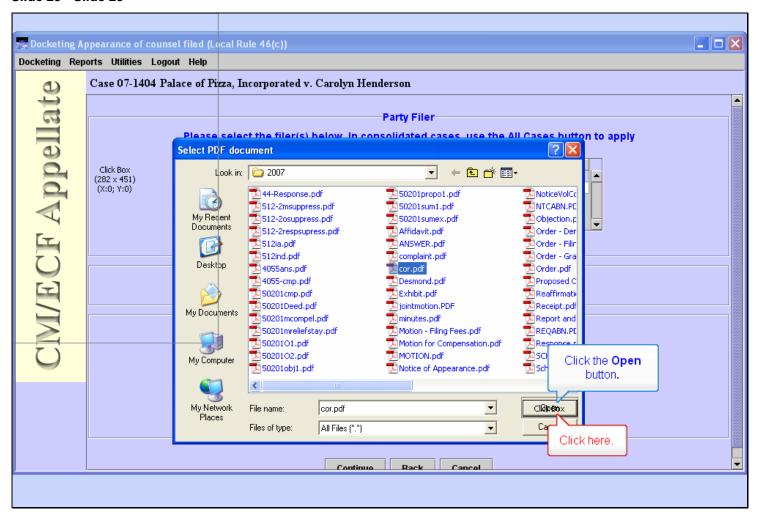
#### Slide 28 - Slide 28



## Slide notes

After you have verified that this is the correct document, you may close the Acrobat window by clicking its close button.

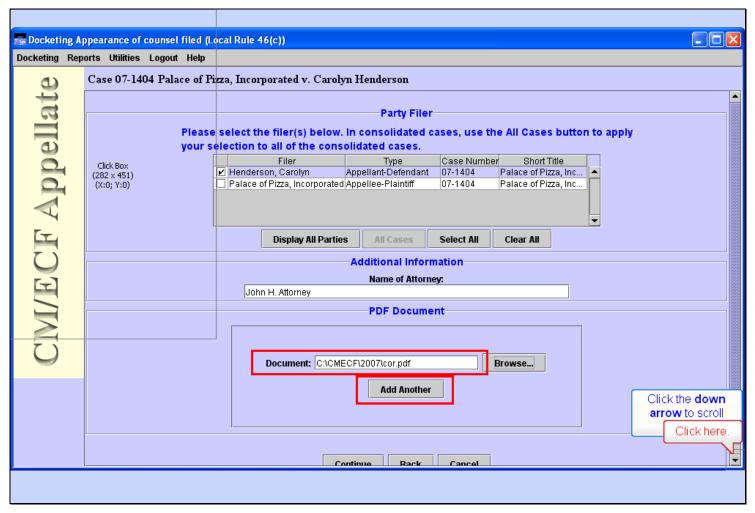
#### Slide 29 - Slide 29



## Slide notes

Now that we know this is the correct appearance form, click the Open button.

#### Slide 30 - Slide 30

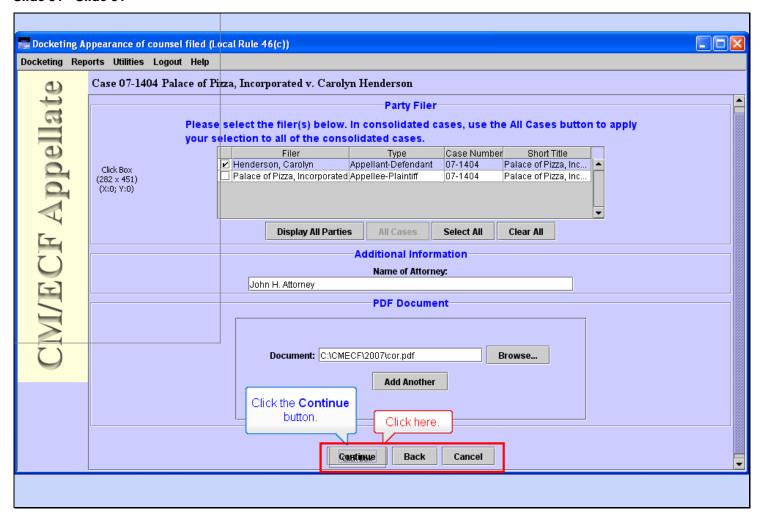


## Slide notes

CM/ECF fills in the path and file name of the document you are filing. If you had other documents, such as attachments, you could click the Add Another button and repeat the process for each PDF file.

Click the down arrow to scroll down a bit.

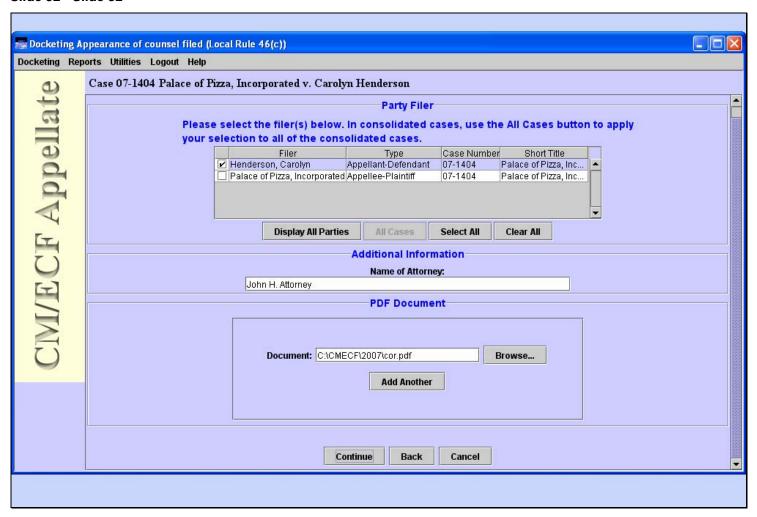
#### Slide 31 - Slide 31



## Slide notes

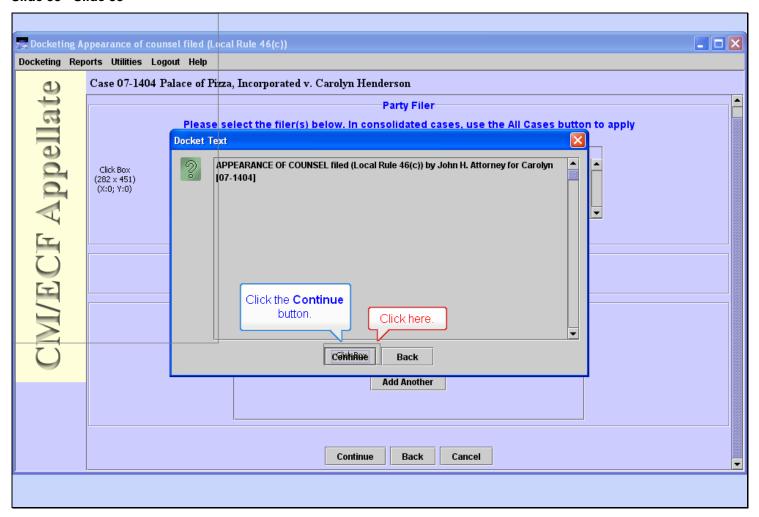
At the bottom of the screen are three buttons. You would click Continue to continue with this event, or click Back to back up to the previous screen in this event, or Cancel to cancel this transaction altogether. For this lesson, click the Continue button.

#### Slide 32 - Slide 32



## Slide notes

#### Slide 33 - Slide 33

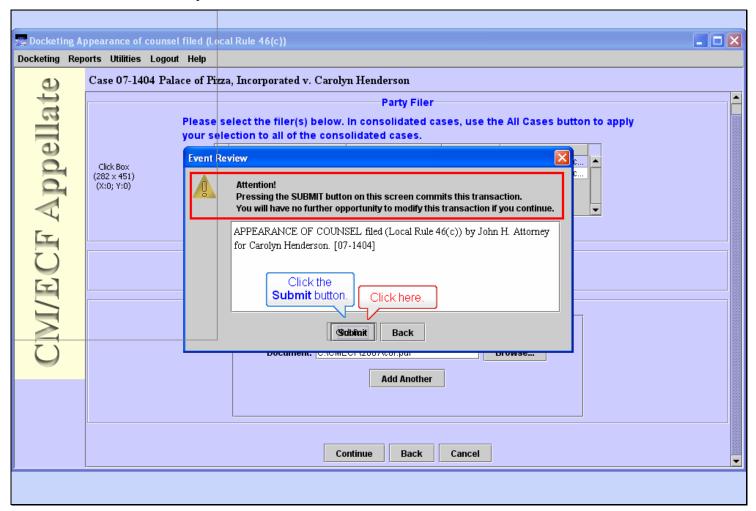


## Slide notes

CM/ECF builds a docket entry as you go through the screens to file your document. This screen shows you the docket text it has created based on your inputs so far. If anything looks incorrect at this point, you should click the Back button to back up and correct any entries.

We will assume everything is correct, so click the Continue button.

# Slide 34 - Submit Docket Entry

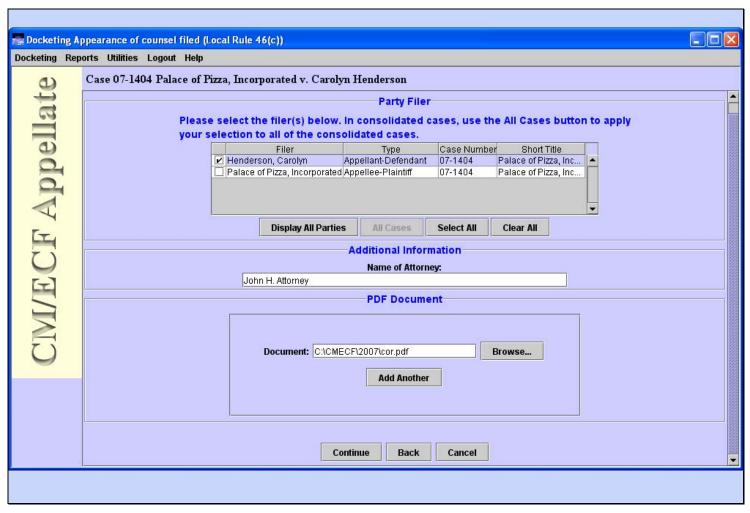


## Slide notes

This is the "point of no return". As the message indicates, once you click the Submit button on this screen, your transaction is then submitted to the court. You will have no further opportunity to back up and change anything. So be sure the text says what it should say.

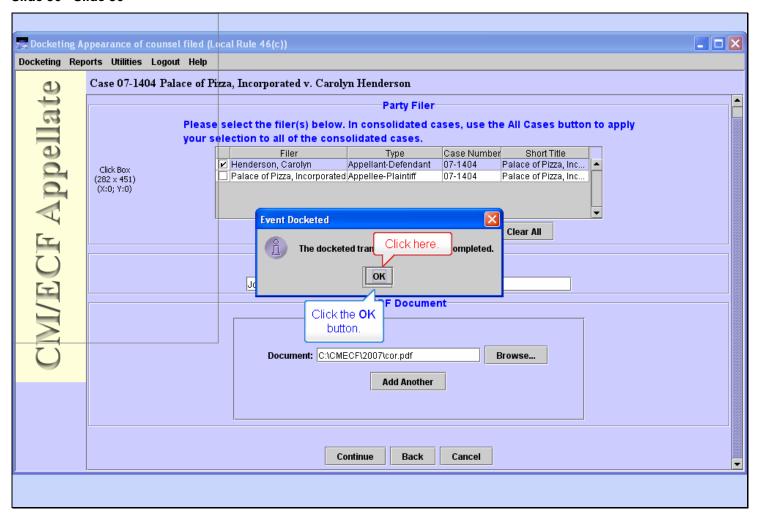
Click Submit.

#### Slide 35 - Slide 35



## Slide notes

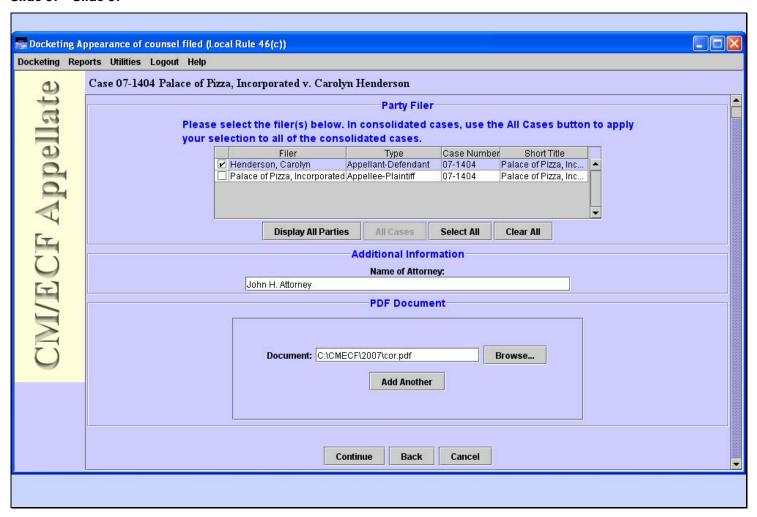
## Slide 36 - Slide 36



## Slide notes

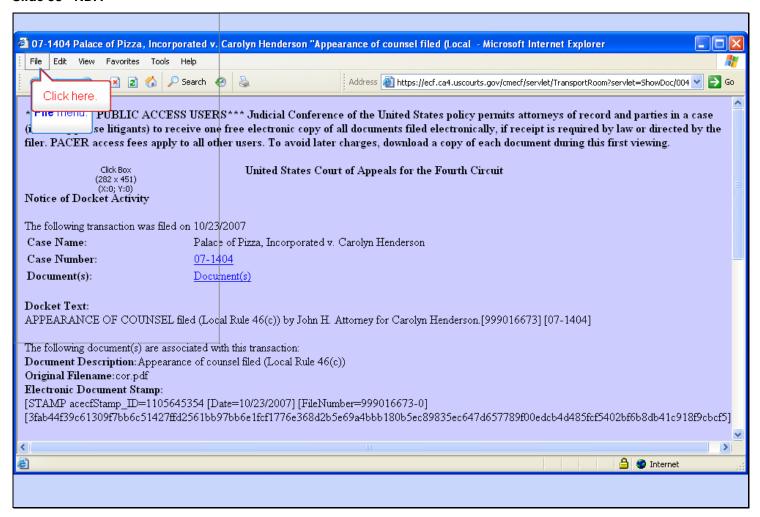
Once the CM/ECF server has received your transaction, you will see this dialog box indicating the docketed transaction has been completed. Click the OK button.

## Slide 37 - Slide 37



## Slide notes

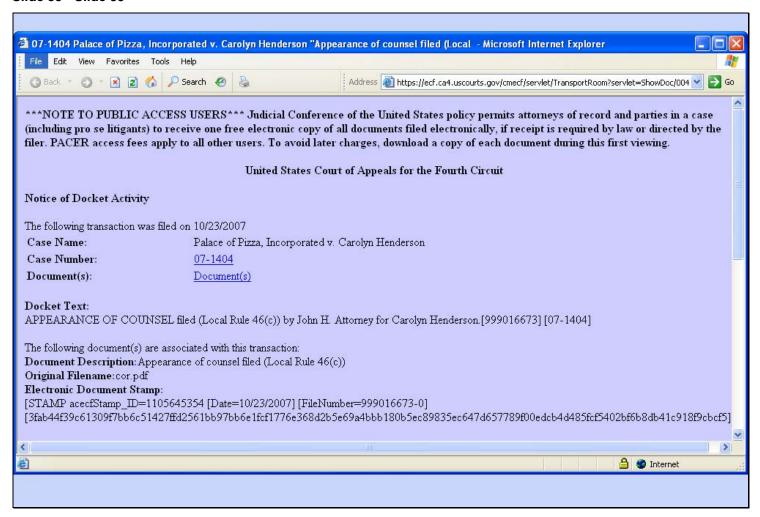
#### Slide 38 - NDA



### Slide notes

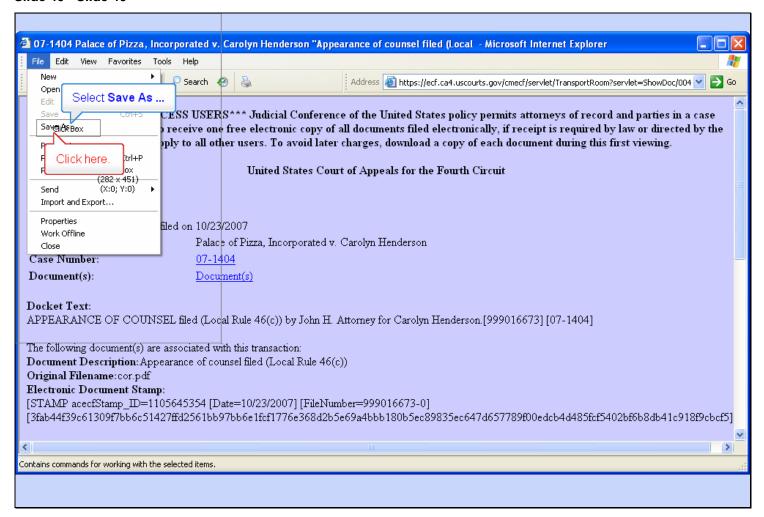
The CM/ECF computer returns to you a Notice of Docket Activity, often called an NDA. This is your proof that the transaction was accepted by the court. It's a good practice to save a copy of this notice on your computer. To do that, click File in your browser's menu.

## Slide 39 - Slide 39



### Slide notes

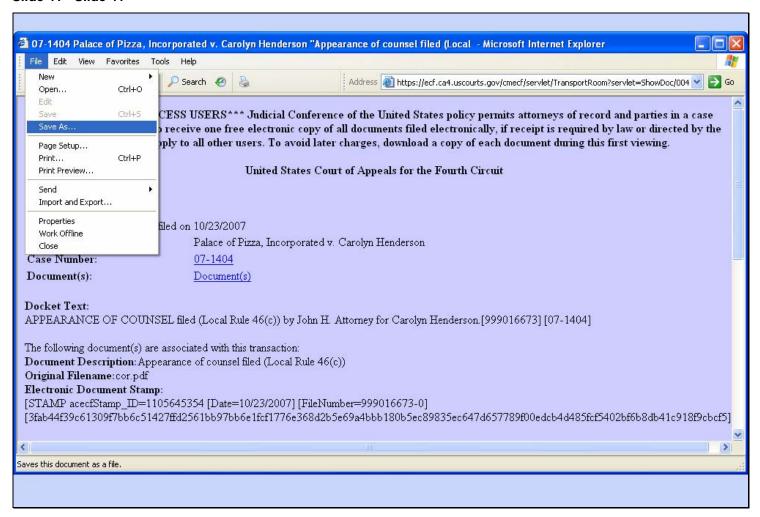
## Slide 40 - Slide 40



### Slide notes

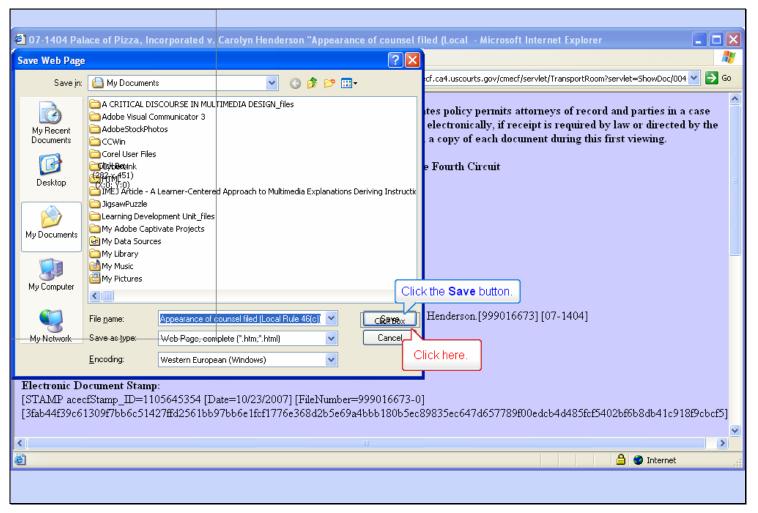
From the drop-down menu, click Save As ...

## Slide 41 - Slide 41



### Slide notes

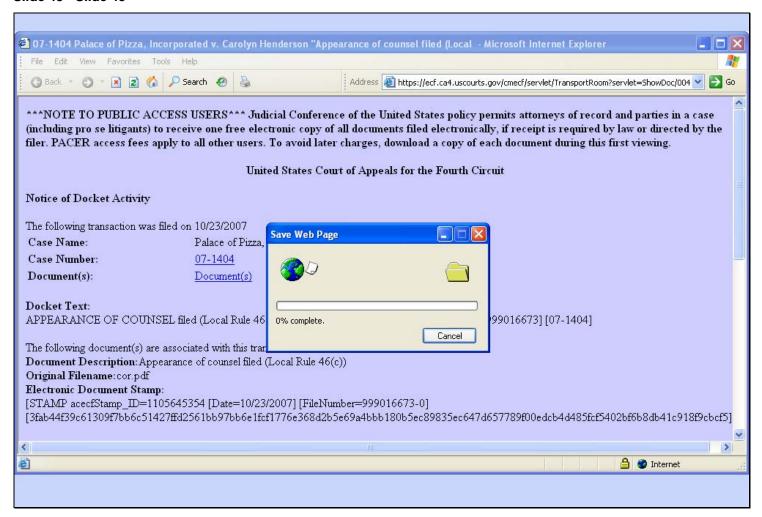
#### Slide 42 - Slide 42



### Slide notes

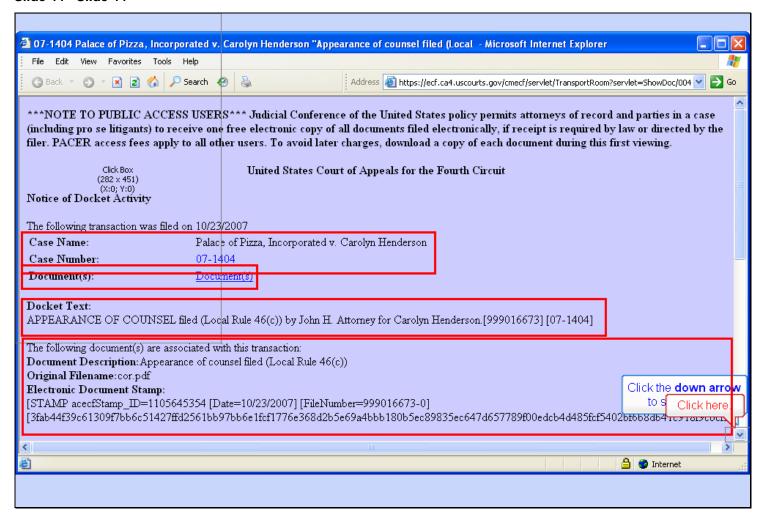
CM/ECF fills in the file name for you. You can change it if you want. Also, in this example our file will be saved in the My Documents folder, but you can change the Save in folder also if you want. We'll leave everything as is. Click the Save button.

## Slide 43 - Slide 43



### Slide notes

#### Slide 44 - Slide 44



### Slide notes

Now that we have saved a copy of the NDA, let's take a closer look at it.

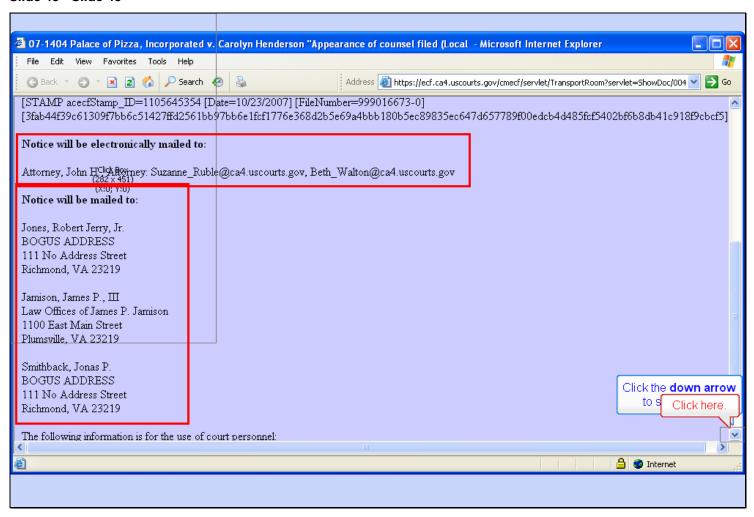
The notice includes the case name and the case number. The case number is a hyperlink to the docket report for this case. We'll look at the docket report in just a moment.

The notice also includes a hyperlink to the document or documents that were submitted with this docket entry. In this case it would be a hyperlink to the appearance of counsel form we just submitted.

The notice includes the docket text that was created by our filing, along with information about the document that was submitted.

To see the rest of the notice, click the down arrow in the scroll bar.

## Slide 45 - Slide 45

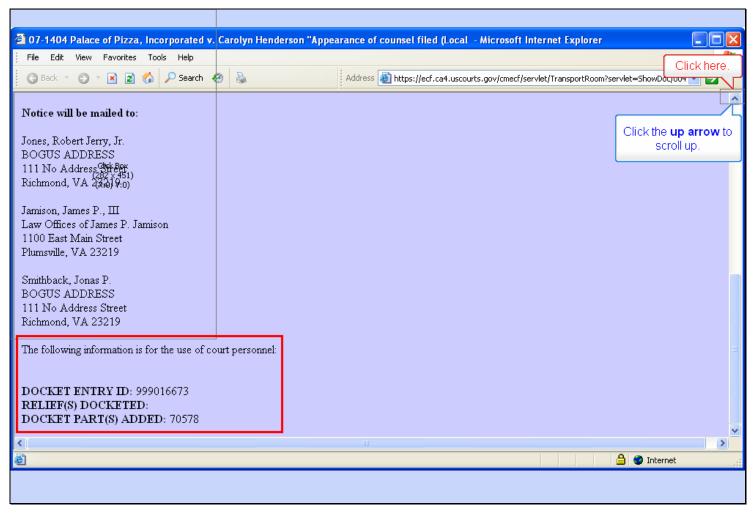


### Slide notes

The bottom part of the notice indicates service information. First, it indicates who will receive notice electronically by E-mail. Then it indicates who will need to be noticed by normal mail.

Click the down arrow to scroll all the way to the bottom of the notice.

## Slide 46 - Slide 46

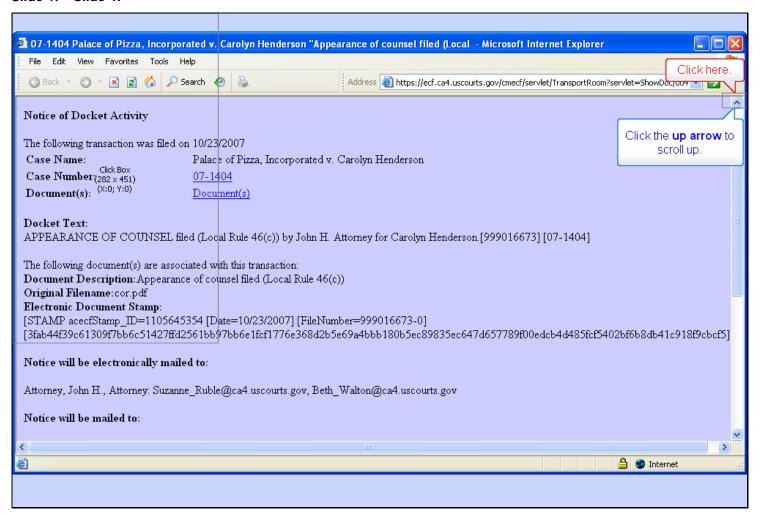


## Slide notes

The information at the bottom of the notice is for court personnel.

Click the up arrow to scroll back to the top of the notice.

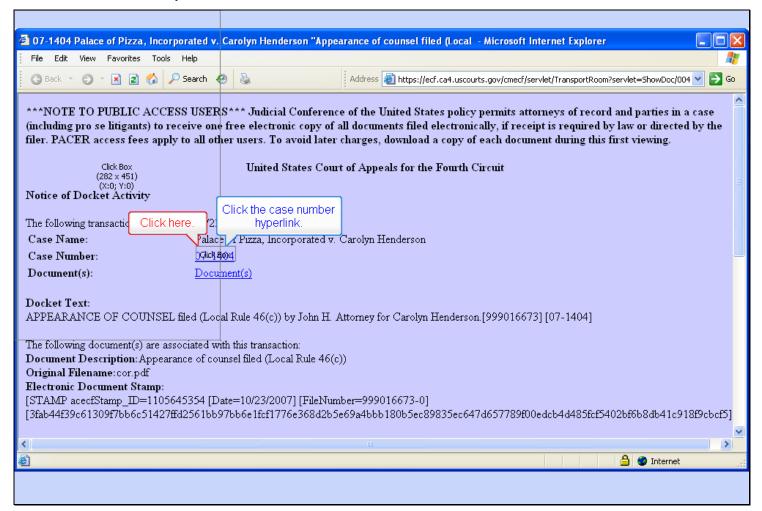
## Slide 47 - Slide 47



### Slide notes

Scroll up just a bit more.

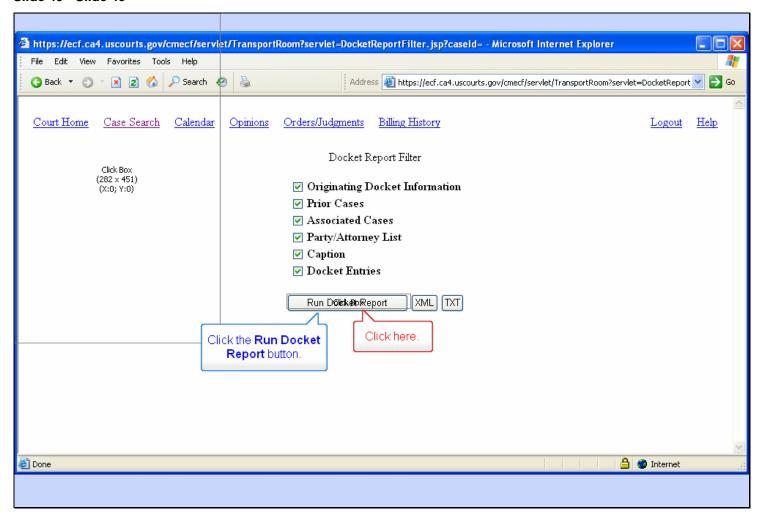
## Slide 48 - View Docket Report



### Slide notes

Remember the case number is a hyperlink to the docket report for this case. Let's see how that works. Click the case number hyperlink.

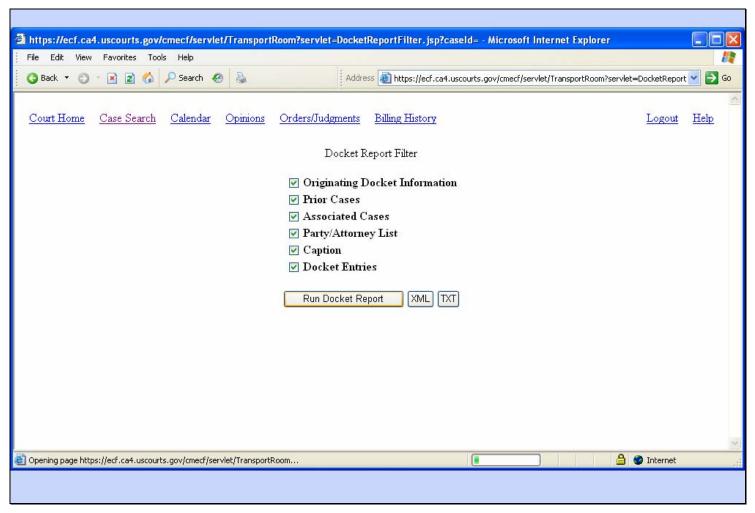
## Slide 49 - Slide 49



## Slide notes

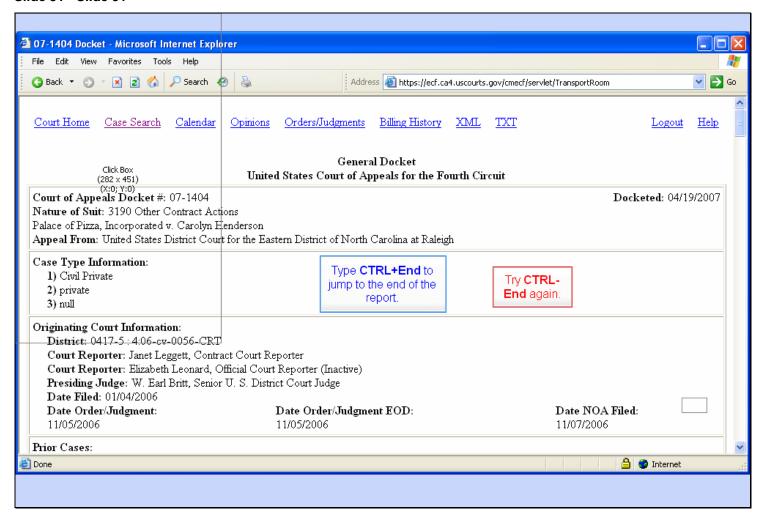
CM/ECF offers you some choices about what to include or exclude from the docket report. Everything is selected by default. You would click the check box to de-select any item you don't want to include. We'll leave them all checked. Click the Run Docket Report button.

## Slide 50 - Slide 50



## Slide notes

## Slide 51 - Slide 51

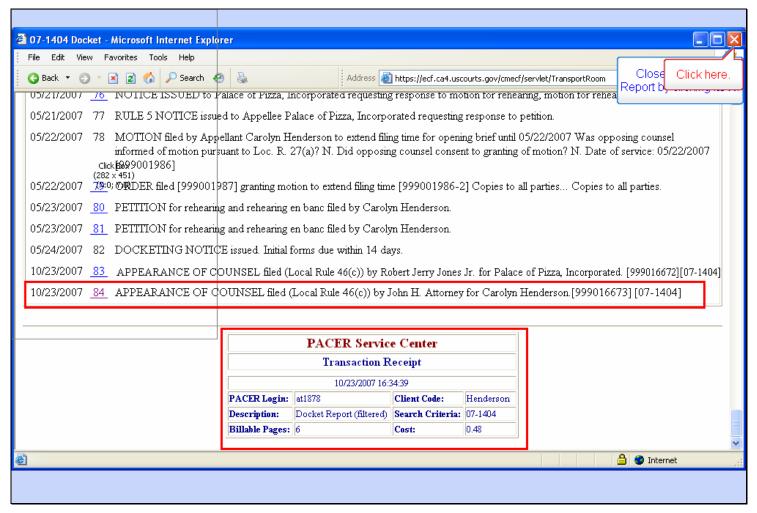


### Slide notes

And the docket report is displayed.

Since the docket report is in chronological order, the docket entry we just submitted for the appearance of counsel form will be at the end of the report. To jump directly to the end of the report, you can use CTRL+End. This means to hold down the CTRL key on your keyboard, then tap the End key.

#### Slide 52 - Slide 52



### Slide notes

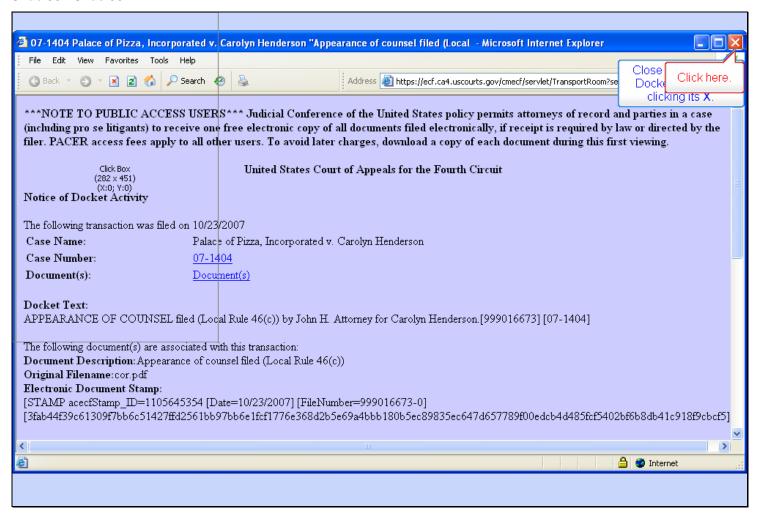
And now we're at the end of the report for our practice case. (Since this is a practice case the docket entries don't always make sense). The appearance of counsel form we just submitted is the last docket entry.

Notice also at the bottom of the report is a PACER Service Center Transaction Receipt, indicating the costs involved.

Like the Notice of Docket Activity, you could save or print of copy of this docket report if desired.

Close the docket report by clicking its close button.

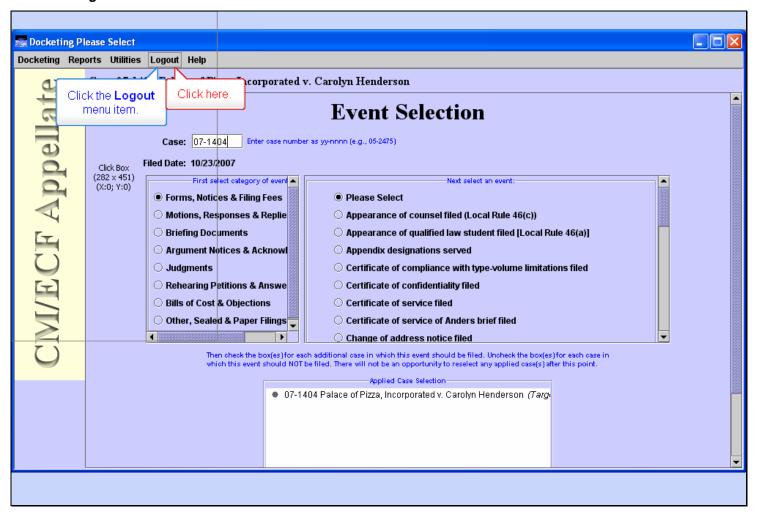
#### Slide 53 - Slide 53



### Slide notes

And now close the NDA by clicking its close button.

## Slide 54 - Logout

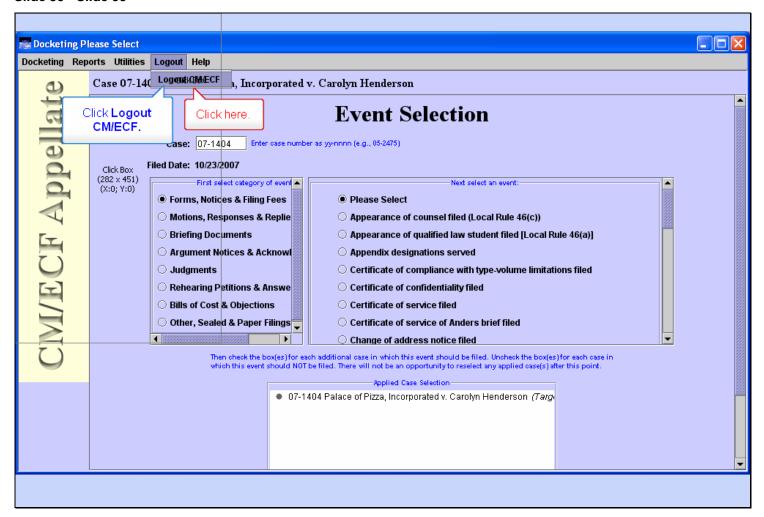


### Slide notes

And we're back to the Event Selection screen. If you had another document to file you could do so. We'll assume we're done.

You should remember to log out when you're done. To do so, click Logout in the CM/ECF main menu.

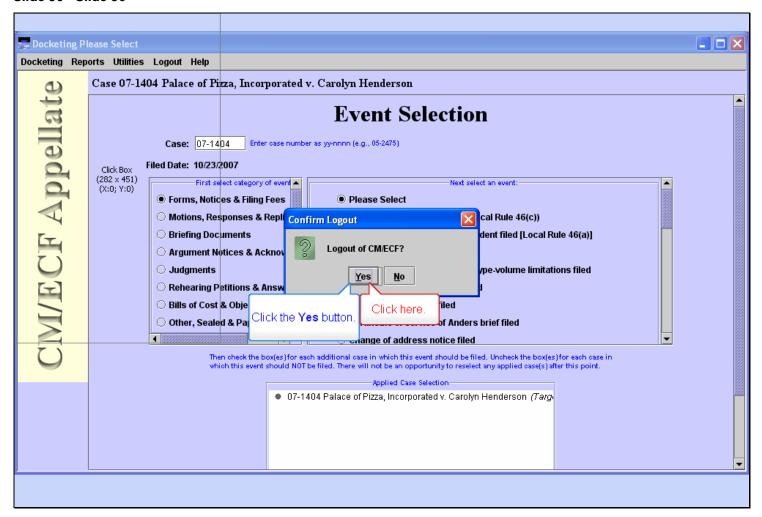
## Slide 55 - Slide 55



### Slide notes

Now click Logout CM/ECF.

## Slide 56 - Slide 56



## Slide notes

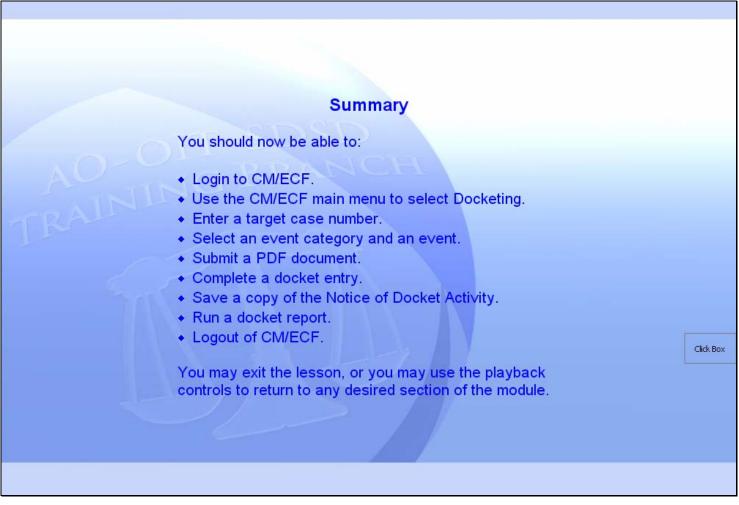
Confirm you want to log out by clicking the Yes button.

## Slide 57 - Slide 57



### Slide notes

## Slide 58 - Summary



## Slide notes

This concludes the lesson on filing an Appearance of Counsel form. Before we go, let's summarize. You should now be able to do the things in this list. You may exit the lesson, or you may use the playback controls to return to any desired section of the module.

## Slide 59 - Exit



# Slide notes

Thanks for taking the lesson. Goodbye.